# Managing Up

## Tactics for Working Well FOR Others

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Managing Up:
Tactics for Working Well FOR Others

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# Program Objectives

## Target Participant

This program is designed for all people wishing to evaluate and improve their ability to manage up.

## Learning Objectives

By the end of this training, you should be able to:

- Meet the objectives listed in each section of the workbook.
  - Define the phrase "managing up."
  - Describe five ways to better understand your environment and job responsibilities.
  - Evaluate your current skill set.
  - Explain what the boss expects of you.
  - Explain the communication process and how breakdowns can occur.
  - Identify barriers to effective listening.
  - Describe six steps for promoting active listening.
  - Explain the difference between open and closed questions and the value and limitations of each.
  - Demonstrate six steps for dealing with difficult people.
  - Identify techniques for dealing with specific challenges.
  - Rephrase inflammatory responses for better communication.
  - Reword inappropriate comments.
  - Explain how to say "no" professionally.
  - Describe how words, tone, and body language impact communication.
  - Demonstrate how tone of voice can change the meaning of a message.
  - Explain professional telephone behavior.
  - Discuss six rules for better telephone etiquette.
  - Successfully answer case studies.
  - Identify the components of professional email.
  - Successfully answer case studies.
  - Explain how appearance can affect your professional reputation.
  - Discuss guidelines for dressing well for your job.
  - Identify your time management strengths and weaknesses.
  - Review various time management rules and tools.

# Program Objectives (continued)

- Explain how to successfully manage deadlines.
- Identify techniques for controlling interruptions.
- Review responses to people who make demands of your time.
- Discuss techniques for conquering procrastination.
- Review ten actions you can take to help your boss (and help yourself).

> Develop an action plan to improve your skills.

- What area do you propose to improve?
- Why is this improvement needed?
- What is your recommendation for improvement?
- What steps do you need to take to implement this change?
- How will you know if you are successful?

# About the Workbook

## Business Training Works' Training Philosophy

Business Training Works, Inc. believes strongly in the benefits of instructor-led training, hands-on activities, and a relaxed classroom environment. This workbook is designed to enhance your learning during class, not to substitute for your attendance.

## Workbook Format

All Business Training Works' workbooks contain the following components:

Program Philosophy
Table of Contents
Program Objectives

It is our belief that people will learn if they understand what and why something is being taught. Further, they will use newly learned skills if they set concrete goals at the end of the session related to the program.

## Workbook Standards

We have attempted to create clean, clear, concise pages throughout this book. The following are a few of the standard formatting conventions you should understand.

**Bold Heading** – Bold headings at the top of each page indicate the concept or topic covered on the page.

Critical Thinking Exercise – This icon appears throughout the book to indicate some type of hands-on activity. You are most likely to retain the communicated information if you take advantage of the space provided to record your thoughts.

Right Margin Notes – The right side of each page is note-taking space. Occasionally, you will also find a relevant quotation, skills summary, or question.

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# Managing Upwards – To Get Where You Want to Go, You Need to Know Where You Are

## Why Some People Are Outstanding Direct Reports

Question: Why is it that some people are able to keep cool in tough situations, stand up for themselves without being rude or making enemies, and say the right thing no matter what the situation?

Answer: Although some are lucky, most have spent years developing their people skills, learning as much as possible about their organization's products and services, and genuinely trying to help their boss and others solve problems.

Notes:

**Learning Objective**

**Define the phrase "managing up."**

understanding the WAY my manager operates and adapting my work style to meet their needs.

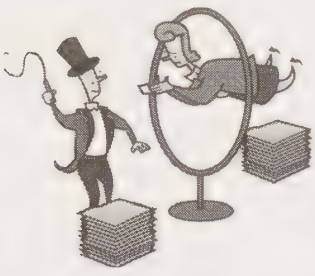
Look

# Managing Upwards – To Get Where You Want to Go, You Need to Know Where You Are (continued)

Q What other things should you know about our boss?

- Transparency
- Consistency
- Inform
- Accountability
- Comparisons

## What Managing Upward Is Not



Managing upward is NOT "kissing up" or mental manipulation. Some books and articles on this subject will suggest, for instance, that you find out what type of foods your boss enjoys and order them for lunch in order for him or her to like you better. Sure, they may like you better, but that doesn't mean you have an effective working relationship.

Managing upward is NOT about simply adapting your style to match your bosses and then mimicking his or her style. While it is important to understand your boss's style, that is not the whole picture. You must learn when and how to adapt, and when and how to balance your boss's style.

Managing upward is not a simple matter of "shutting up and putting up" with the boss. In fact, as in any effective relationship, managing upward requires that you develop more constructive ways to negotiate shared goals, build trust, and openly acknowledge conflicts and issues with your boss so that they may be constructively resolved rather than ignored.

What are things that help Build trust.

[What in it for them?]

# No Easy Answer

**What is the formula for managing upward?**

There are no easy answers to that question because every situation and organizational context is unique.

What works well in one organizational setting may be a disaster in another. Nevertheless, there are a few tried and true common sense principles for managing upward.

Notes:

**Learning Objective**

**Describe five ways to better understand your environment and job responsibilities.**

## Five Keys to Success

1. Take time to understand the organization's environment including its goals, objectives, and strategies. Know where you and your boss fit into the big picture.

2. Evaluate yourself. Are you managing yourself well? Are you well organized? Do you manage your time well? Are you technically competent?

3. Think about what you want from the boss and what the boss realistically can provide. If you don't have a clear idea of what you want and need, then there is not much point in worrying about how to get it.

4. Evaluate your boss's strengths and weaknesses and how those work together with your own strengths and weaknesses.

5. Realize that managing upward is not about managing your boss. Rather, it is about managing yourself within a multifaceted set of peer and hierarchical relationships.

# Self-Assessment Quiz

Notes:

Learning Objective

**Evaluate your current skill set.**

### Critical Thinking Exercise

Take a few moments to answer the questions on the following quiz. We will not discuss your answers. The purpose of the exercise is to help you to identify your current strengths and opportunities for improvement.

| Self-Assessment Quiz | | | |
|---|---|---|---|
| 1. | T | F | I am able to quickly read a situation and adjust my style to accommodate people who require a lot of detail as easily as I am able to adjust my style to accommodate people who simply want the big picture. |
| 2. | T | F | I know how to say "no" to people and still leave them feeling satisfied with me and our organization. |
| 3. | T | F | I know how to deal with difficult people without getting angry, upset, or rude. |
| 4. | T | F | I understand telephone etiquette, how to transfer people, how to put someone on hold, etc. |
| 5. | T | F | I get along well with my coworkers, and we present a unified front to others. |

# What the Boss Expects

### Critical Thinking Exercise

Most of us have had both good and bad experiences with bosses. In groups, take a few moments to think about a good experience and a bad experience. What factors contributed to each?

| Good Experience | Bad Experience |
|---|---|
| | |

**Biggest Challenges of Working with the Boss**

Notes:

**Learning Objective**

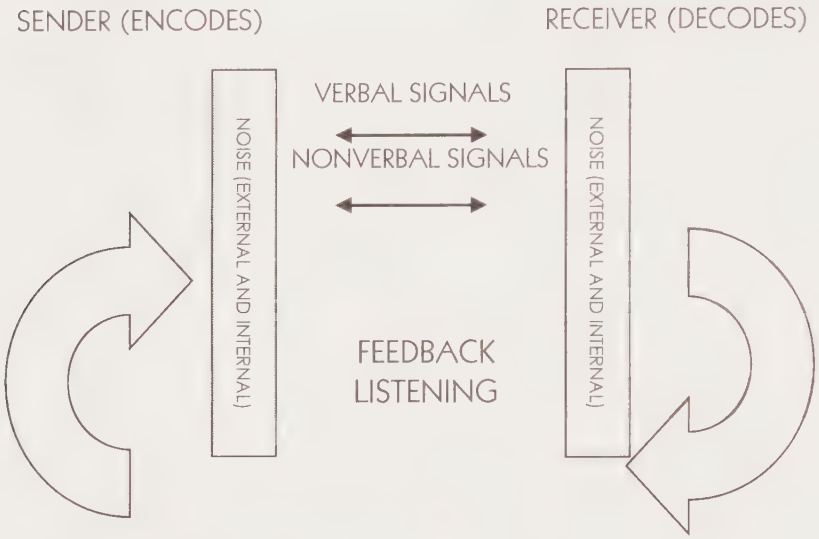
**Explain what the boss expects of you.**

**What The Boss Expects**

1. Loyalty
2. Willingness to Challenge
3. Think Differently
4. Self-Esteem
5. Honesty
6. Discretion
7. Team Player
8. Produce Quality Work
9. Top Communication Skills
10. Fact Finder
11. Self-Critic
12. Self-Motivator
13. Hold Down the Fort
14. Professional Behavior at All Times

# Model of Communication

### Model of Communication




### Critical Thinking Exercise

Working in groups, answer the following questions. Use the space below to record your answers.

1. What is the definition of communication?

2. What is the difference between notifying and communicating?

3. How are you sure that you are communicating effectively?

Notes:

**Learning Objective**

**Explain the communication process and how breakdowns can occur.**

**Here are some ways to give feedback to stimulate conversations:**

*What I hear you saying is . . .*

*Let's see if I'm following you . . .*

*May I summarize . . .*

*Please tell me more about . . .*

*A word is not a bird: Once on the wing, it can never be caught again.*

Russian Proverb

# Listening Versus Hearing

Like it or not, we've all done it and had it done to us. What is this "it?" Failure to listen.

### Critical Thinking Exercise

Match the types of listening on the left with the appropriate definitions on the right.

### Types of Listening

| | |
|---|---|
| Pseudolistening | Avoiding what you don't want to hear. |
| Stage Hogging | Collecting information to attack someone with later. |
| Selective Listening | Hearing what you want to hear. |
| Insulated Listening | Perceiving innocent comments as personal attacks. |
| Defensive Listening | Pretending to listen. |
| Ambushing | Redirecting the conversation back to self. |
| Insensitive Listening | Responding inappropriately to what is said. |

### Reasons for Why We Don't Listen

- Message Overload
- Preoccupation
- Too Much Effort
- Tired
- Rapid Thought
- External Noise
- Faulty Assumption (e.g. I've heard it before.)
- Not Interested
- Lack of Training

Notes:

**Learning Objective**

**Identify barriers to effective listening.**

*Everybody's talking at me*
*I don't hear a word they're sayin'*
*Only the echoes of my mind.*

Fred Neil

**FACT FILE**

Human beings are capable of understanding speech at up to 600 words a minute. The average person speaks between 100 – 150 words a minute. Is it any wonder that our minds wander?

# Six Steps for Promoting Active Listening

1. *Display involvement in what the person is saying.* Show interest verbally by encouraging the speaker to say what is on her mind. Show interest nonverbally by focusing on the person who is speaking. Use body posture that shows that the person has your full attention (e.g., lean forward in your chair with hands in your lap; don't lean back in your chair with arms crossed over your chest).

2. *Carefully observe the person speaking.* Observe his words and body language to learn more about how he feels about the situation he is describing.

3. *Resist distractions.* Stay focused on the conversation and avoid doing anything else (answering the phone, starting another conversation) other than listening to what is being said.

4. *Try to stay focused on what is being said.* Notice the speaker's behavior (e.g., nervousness or anger during the conversation), but work at not being distracted by it.

5. *Avoid judging what is said.* Expressing personal views or biases can cloud the communication.

6. *Ask for clarification of anything that you do not fully understand.* Ask questions regarding meaning or intent. Restate or paraphrase what the other person said.

Notes:

**Learning Objective**

**Describe six steps for promoting active listening.**

NEGATIVE HABITS

**Daydreaming**
Don't plan your grocery list or your next vacation while someone is talking.

**Facts Only Listening**
Don't preoccupy yourself with a speaker's minor points or missteps.

**Poor Posture**
Don't slump, yawn, cover your face, prop your head on your palm, or fold your arms.

# Six Steps for Promoting Active Listening (continued)

### Critical Thinking Exercise

When instructed by the facilitator, select a partner and move to a place where you can talk comfortably. Choose a subject about which you disagree. One of you should begin expressing your views and the opinions on the subject you chose. The other must respond by paraphrasing and asking questions, not by judging or disagreeing. When instructed by the facilitator, switch roles. At the end of the activity, ask yourself the following questions:

1. What was difficult about this exercise?

2. Is this what you normally do in your everyday communication? Why or why not?

**Faking Attention**
Don't act like you've been listening and ask "general guess" questions. When you ask questions that are way off the mark, it can embarrass you and the speaker.

# Open Ended Versus Closed Questions

Different kinds of questions generate different responses. From the previous exercise, you probably found yourself asking both open and closed questions.

**Closed Questions**
Are you okay?
Are you a morning person or a night person?
Are you interested in going to the brown bag lunch training session?

**Pros:** Fast and short.

**Cons:** Incomplete responses, can be leading and hence irritating or even threatening to user, may miss the real issue, discourages disclosure.

**Open Questions**
You appear upset. Let's sit down. What is bothering you?
Exactly how do you do this?
Tell me about how you got this job and what you like best about it...

**Pros**: Develop trust, are perceived as less threatening, allow for more latitude in their response, and may be more useful with articulate users.

**Cons**: Can be time-consuming, may result in superfluous information, and may demand more effort on the part of the user.

As a general rule, use closed questions to finish a conversation or part of a conversation. Use open questions to get the other person to speak more.

Notes:

**Learning Objective**

**Explain the difference between open and closed questions and the value and limitations of each.**

*In order to get at any truth about myself, I must have contact with another person. The other is indispensable to my own existence, as well as to my knowledge of myself.*

Jean-Paul Sartre

# Open Ended Versus Closed Questions (continued)

### Critical Thinking Exercise

Evaluate the list of questions below. Indicate whether each is an open or closed question by marking an "o" or "c" in the space to the left of the question. Hint: if a "yes" or "no" response is possible, the question is closed.

— Are you looking for [subject]?
— Can I help you?
— What kind of information are you looking for?
— What would you like to know about [subject]?
— Can you describe the kind of information you want?
— When you say [subject], what do you mean?
— Could you be more specific?
— Have you searched elsewhere?
— How may/can I help you?
— May I help you?
— What do you mean by [subject]?
— What examples can you give me?
— Where have you looked already?
— Can you give me an example?
— Can you give me more information?
— Would you tell me more about [subject]?

At this point, you should be able to identify both open and closed questions. The trick for making these questioning methods useful in teams is knowing when to use them and how to use them. Evaluate the cases below in groups.

*The greatest compliment that was ever paid me was when one asked me what I thought, and attended to my answer.*

Henry David Thoreau

*The need to be right – the sign of a vulgar mind.*

Albert Camus

# Open Ended Versus Closed Questions (continued)

**Case One:**
You are working with a teammate who is frustrated by the workload and essentially uncommunicative. What would you ask in order to elicit more than a one word response? Would you use open or closed questions?

**Case Two:**
You are facing a production deadline and have an equipment failure. You have seen the problem before and know how to fix it. You must, however, confirm that what you think went wrong actually did before you begin. Would you use open or closed questions? A combination? Why?

**Case Three:**
You have been given a PowerPoint presentation to put together as part of a larger project. Like everyone else, you are very busy. What types of questions should you ask your boss before you begin? When should you ask your questions? Does it matter whether you understand the larger project?

# Dealing with Difficult People

People who don't learn how to deal with difficult people don't last long in the business world. Regardless of whether people are rude, frustrated, belligerent, irate, etc., there are ways to deal with minor clashes to avoid major blowups.

### Six Steps to Success

1. **Let them vent.**
   - Don't interrupt the speaker.
   - Nod your head often and say "uh-huh" (actively listen).
   - Maintain eye contact.
   - Avoid phrases such as, "You have to," "You must be confused," "We can't," etc.

2. **Don't get sucked into a negative mindset.**
   - Judge the situation, not the person.
   - Keep a positive mind-set.
   - Avoid sarcastic tones.

3. **Express empathy for the situation.**
   - Identify with the other person's frustration.
   - Use "Phrases that Work."

4. **Switch to solution mode.**
   - Ask questions to clarify the problem.
   - Double check the facts.
   - Offer solutions.
   - Ask for suggested solutions.

Direct with Respect

Power phases – book

Dawn metye Runion

Notes:

**Learning Objective**

**Demonstrate six steps for dealing with difficult people.**

**Empathetic Phrases That Work**

*I can see how you could feel that way.*

*I understand what you mean.*

*I can see how frustrating this is for you.*

*I am sorry.*

1) Say what you mean,
2) mean what you say,
3) Don't be mean,
4) Direct with respect

I want to hear what you have to say and not in this way.

# Dealing with Difficult People (continued)

5. **Mutually agree to a resolution.**
   - Confirm agreement.
   - Don't over promise.
   - Under promise and over deliver.

6. **Follow up.**

**Communication Skills Improvement**

Smile
Name Recognition
Eye Contact
Open Posture
Territory Respect
Lean Forward
Nod
Appearance

# Diagnosing and Treating Difficult Situations

## Critical Thinking Exercise

In groups designated by the facilitator, review the descriptions of the colleagues and bosses listed below. Next, in the space provided, describe how you would handle each boss.

| Behavior | Treatment |
|---|---|
| **Abusive Colleague/Manager**<br> <br>Your colleague/ manager treats you in a harsh, dictatorial manner. She frequently erupts in a tantrum, harshly criticizes your mistakes, and compares you unfavorably to your peers. | When you bring the Ruler out, I feel threaten and scared. I the future when we talk please Leave the Ruler home And that will make me feel better |
| **Keeps You in the Dark Colleague/Manager**<br> <br>Your colleague/ manager does not share the big picture with you. Frequently you make poor decisions because you have not been clued in on how your work fits into the grand scheme of things. | |

Notes:

**Learning Objective**

**Identify techniques for dealing with specific challenges.**

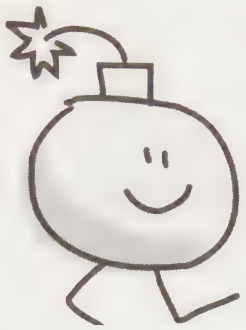


Information Mapping for MAC

# Diagnosing and Treating Difficult Situations (continued)

| | |
|---|---|
| **Rigid Colleague/Manager**<br> Your colleague/ manager is picky, picky, picky. You never get a "thank you" without a "next time do this differently." | |
| Other | |
| Other | |

# Disarming the Time Bomb



1. **Employee One:** *Could you wait for me to return the form this afternoon?*
   **Employee Two:** *I leave at 5:00.*

   Why might this response anger the first employee?

   What could the second employee have said instead?

2. **Employee One:** *Why have I not heard anything from your office?*
   **Employee Two:** *You filled out the forms the wrong way.*

   Why might this response anger the first employee?

   What could the second employee have said instead?

3. **Employee One:** *How do I get to that department?*
   **Employee Two:** *Call them and ask.*

   Why might this response anger the first employee?

   What could the second employee have said instead?

Notes:

Notes:

**Learning Objective**

**Rephrase inflammatory responses for better communication.**

**When You Make A Mistake**

1. Listen and Empathize
2. Apologize
3. Fix the Problem
4. Keep Your Promises
5. Thank Your Client
6. If Possible, Offer Atonement
7. Follow Up

# Disarming the Time Bomb (continued)

4. **Employee One:** *Could you check on the status of my paperwork?*
   **Employee Two:** *The computer is down. You will have to wait.*

   Why might this response anger the first employee?

   What could the second employee have said instead?

5. **Employee One:** *What is the next step in the approval process?*
   **Employee Two:** *Read the handout I gave you. The information is in there.*

   Why might this response anger the first employee?

   What could the second employee have said instead?

# Rephrase For Better Relationships

As we have discussed throughout the course, it's not always the message that turns people off; it's the delivery.

### Critical Thinking Exercise

Take a few moments to review the following phrases. How would you restate them for more effective relations with others?

| Typical | Better |
|---|---|
| That's not my job. | Let me put you in touch with someone who can help you. |
| You're right. The policy we have is really stupid, but that's the way it is. | |
| That's not my fault. | |
| You want it by when??? | |

Trigger words

Notes:

**Learning Objective**

**Reword inappropriate comments.**

**Improve Your Listening Skills**

Stop what you're doing.

Be patient.

Withhold judgment until the person finishes.

Pay attention to content.

Repeat the words in your mind.

Cue yourself if your mind starts to wander.

Concentrate on the unspoken message.

Give body language to indicate you are listening.

# Rephrase For Better Relationships (continued)

| | |
|---|---|
| Calm down. | ~~Let pull it together~~ I understand that you feel R |
| I am busy right now. | I have the follow issues on My plate, Lets set up another time to set ~~to~~gther |
| I don't know. | I need to Look into that more And get back to you. |
| No. | |

Question the person if necessary.

Restate the essence of what has been said.

# Learn to Say "No" Once and for All

Notes:

**Learning Objective**

**Explain how to say "no" professionally.**

Most of us say "yes" when we should say "no" because we want to please others and/or because what is being asked of us is well within our capabilities. Recognizing this is the first step to saying "no."

- Putting too much on your plate and not doing a job well or resenting the job is no favor to you or the person who asked you.
- Just because you can do something does not mean it is the best use of your time.

To combat the urge to say "yes" (or the inability to say "no"), consider implementing the following suggestions.

1. Have your plans in writing and stick to them. It is much easier if you can open up your calendar and say, "I'm sorry. That's a wonderful opportunity, but I'm already committed to other activities on those days."

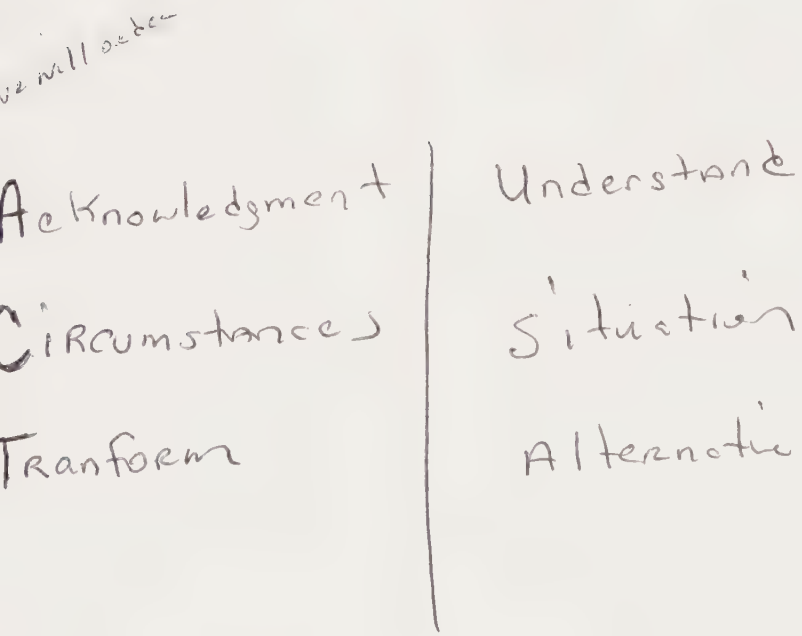
2. Before you answer "no" (or "yes" for that matter), be sure that you fully understand what you are being asked to do. It may be much more or less involved than you initially assume.

3. Keep your answer short. A long answer may make it appear as if you are making excuses.

# Learn to Say "No" Once and for All (continued)

4. Suggest someone else for the task.

5. If you find yourself having to say "yes," try to reframe the task. For instance, "I can help you with the numbers on the Smith account and show you how to pull the Green and Jones information yourself." Or, "I can bake brownies for the party, but the punch is beyond what I am able to get done this evening."



# Understanding Body Language

Have you ever been treated with indifference? Ignored? Talked down to? If you are like most people, the answer to all of those questions is: "YES!" Often, the signals that make us feel as if we are not valued by others are subtle signs in body language, voice tone, etc. Therefore, it makes sense that learning to send the right signals goes a long way in improving the impression we make on others.

## How We Learn from Other People in Social Situations

| | |
|---|---|
| Words | 7 % |
| Tone of Voice | 38 % |
| Body Language | 55 % |

## Primary Components of Body Language

- Facial Expression (Easiest to Control)
- Eye Contact
- Posture and Movement
- Hand Gestures
- Touching
- Physical Distance from Others

## Critical Thinking Exercise

In group, take a few moments to consider the actions from clients listed below. What might they convey?

- Tapping fingers.
- Placing a cap on a pen and putting it in a pocket.
- Heavy sighing.
- Crossing arms and looking down.

open, pleasent, nutueol

"please pass the butter"

Notes:

**Learning Objective**

**Describe how words, tone, and body language impact communication.**

TYPICAL BODY LANGUAGE SIGNALS

**Signs of Aggression**
Leaning Forward, Pointing, Standing/Sitting Close, Rapid or Loud Speech, Glaring, Interrupting Others

**Disagreement with the Message**
Arms Folded, Turned Away from Speaker, Poor Eye Contact

**Alert and Agreeable**
Sitting Upright, Good Eye Contact, Quick to Respond, Arms Open.

# Understanding Body Language (continued)

**When communication occurs over the telephone, words account for ___% of the message and tone of voice ___%.**

## A Look at How Nonverbal Communication Varies from Culture to Culture

Fiorello LaGuardia, Mayor of New York (1933 – 1945) spoke English, Italian, and Yiddish. A group of researchers who watched films of his speeches without a sound track discovered that they could determine which language he was speaking based on his nonverbal patterns.

SOURCE: R. Birdwhistell, *Kinesics and Context,* Chapter 9

# Tone Your Tone

Notes:

**Learning Objective**

**Demonstrate how tone of voice can change the meaning of a message.**

Professional employees should have a warm tone of voice, a friendly demeanor, a can-do attitude, etc. Saying that one should be professional is easy. Explaining exactly how to acquire a professional tone is a little more difficult.

### Elements of Voice Tone

Pitch: How high or low your voice sounds.
Rate: How quickly you speak.
Volume: How loudly or softly you speak.
Inflection: Which words you emphasize.
Articulation: How you enunciate.

### Critical Thinking Exercise

In a moment you will be asked to read the phrases below in several different ways. Think about how you will adjust the elements of voice tone to compete the exercise.

**Case One:**

*Thank you for calling* _____. *This is* _____. *How may I help you today?*

Tired | Bad Attitude | Unsure | In a Hurry
Too Friendly | Professional

**Case Two:**

*I am going to refer you to Kathy Smith, my supervisor. She will be able to help you better than I can with this matter. May I put you on hold and get Kathy on the line?*

Tired | Bad Attitude | Unsure | In a Hurry
Too Friendly | Professional

# Tried and True Telephone Communication Techniques

Notes:

Learning Objective

Explain professional telephone behavior.

### The Basics

- Answer in three rings or less.
- Give your name.
- Use warm, friendly voice tones.
- Be courteous and pleasant.
- Speak clearly and concisely.
- Tell the client what action you are going to take.

### Creating A Voice Mail ~~Message~~ Greeting

- Give your name.
- Tell how to leave a voice mail.
- Ask callers to state their name and number at the beginning of the message.
- Tell who and how to contact if immediate assistance is needed.
- Update your outgoing message as needed.
- Check messages several times a day.
- Return phone calls within one working day.

### Answering Someone Else's Phone

- Give your name.
- Offer to help.
- Record the caller's name.
- Record any message or offer them voicemail.
- Thank the caller.

### Putting Someone On Hold

- Ask permission to put the caller on hold.
- Stay on the line to introduce the caller.
- Volunteer to call back if needed.

# Tried and True Telephone Communication Techniques (continued)

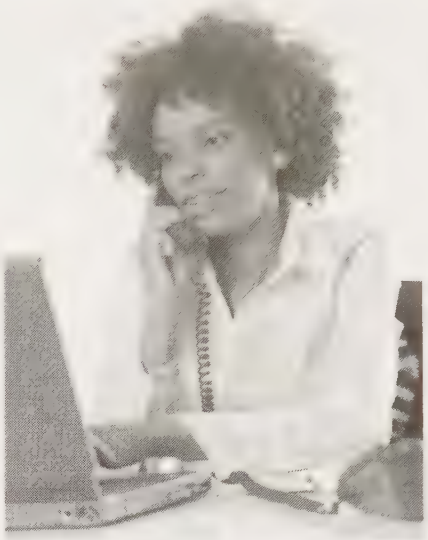
### Handling Rude or Impatient Callers

- Stay calm and remain diplomatic and polite. Getting angry only fuels the fire.
- Show willingness to help.
- Realize that to callers, their issues are the top priority.
- If you are not able to solve a problem or appease callers, offer to have your supervisor talk to them or call them back.

**Winning Telephone Phrases**

1. Hello!
2. I'm sorry to keep you waiting.
3. Good morning!
4. Thank you for waiting.
5. Please.
6. It was nice talking with you.
7. Is there anything else I can do for you?
8. I'm very sorry.
9. Thank you for calling.
10. It's been a pleasure to serve you.
11. You're welcome.
12. I'd be happy to do that for you.
13. May I help you?
14. We appreciate your business.

# Six Rules for Better Telephone Etiquette



### Rule 1

Answer the phone promptly and courteously.

### Rule 2

Do not argue with your clients, call them stupid, treat them as if they are stupid, etc. Don't even do this when you are off the phone. It will bring down your mood and the attitudes of those around you.

### Rule 3

Handle each call consistently and fairly.

### Rule 4

Use the two/one ratio. Listen twice as much as you talk. In the long run, you will save yourself time and energy.

### Rule 5

End each call by summarizing any action items that need to be taken and asking if there is anything else that you can do to assist the client at this time.

### Rule 6

Even if you don't yet have the answer, follow up when you said you would.

Notes:

**Learning Objective**

**Discuss six rules for better telephone etiquette.**

**Sample Greetings**

1. Good Morning. X Organization, Jane Doe speaking. May I help you?
2. Hello. X Organization. May I help you?
3. Good Morning. X Organization, Jane Doe. May I help you?
4. Good Morning. X Organization.
5. Hello. This is Jane Doe. May I help you?
6. Hello. This is Jane Doe in the Secretary's Office.

# Rescue 911 – What Would You Do?

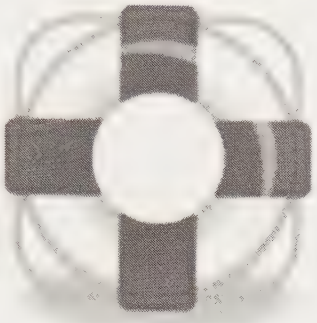
Notes:

**Learning Objective**

**Successfully answer case studies.**

## Critical Thinking Exercise

Working in groups, evaluate the cases below. How would you handle each?



### Case One:

Your boss often loses track of time.
Someone has just called from a meeting saying that she is not there.
How do you respond?

### Case Two:

Your boss has told you not to let his family interrupt him at work. His wife is on the phone and insists on speaking to him. She does not want to leave a message. She is on hold. What do you do?

# Rescue 911 – What Would You Do? (continued)

**Case Three:**

You are at the office holiday party and your boss has had too much punch. She is acting a little crazy. She came to the party alone. What, if anything, should you do?

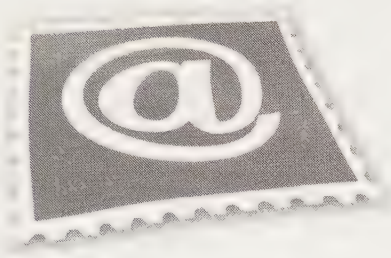
# Professional Email

Notes:

Learning Objective

**Identify the components of professional email.**

You have mail! No surprise there. You probably have a few hundred each morning you come to the office. Like the telephone, email is an essential office tool in most businesses and is also often abused.



### Email Guidelines

- Choose a meaningful subject line.
- Use a basic font for all of your emails (Arial or Times).
- Don't assume email communication is completely secure. It's not. As a general rule of thumb, never put in a mail message anything you would not put on a postcard.
- Use a greeting, just as you would in a letter. (Dear John:)
- Do not forward chain letters or jokes.
- If you are forwarding or re-posting a message, don't change the original wording.
- If you receive a heated message, do not reply in email. Pick up the telephone instead.
- Do not use cutesy stationery, emoticons, abbreviations, etc.
- Proofread the text before you hit send. This includes the names and addresses of the people in the "to" field.
- Include your signature block.
  - First and Last Name
  - Title
  - Organization
  - Address
  - Phone
  - Fax
  - Website Address

# Professional Email (continued)

### Critical Thinking Exercise

Evaluate the message below. What message does it send? Based on the rules just covered, where does it go wrong?

To: All Staff
From: Terry Jones
Subject: Front Desk Magazines

It has come to my attention that appartenly one of you does not have enough reading materials at home. OTherwise, you would not be stealing them from the reception area. We need these for our clients to read when they are waiting in the lobby. Please stop.

Regards,

Terry Jones
Receptionist
Twitch and Twine LLC
324 Main Street
New York, NY 10010
212-555-3232

1. How would you handle the issue described in the email?

2. Rewrite the message above.

# Tools of the Trade

## Critical Thinking Exercise

When used poorly, certain office communication tools designed to improve business communication do exactly the opposite. Anyone who has ever sent a misinterpreted email can attest to this fact. In groups, evaluate and answer the case studies below.

1. You have received an email that you interpret as nasty and rude. How should you respond?

2. Your email system notifies you every five minutes that you have received new mail. You are constantly interrupted to check new messages. What can you do to reduce interruptions?

3. Your telephone is ringing off the hook and a line is building at your desk. Who do you deal with first: the people in front of you or the people on the phone?

Notes:

**Learning Objective**

**Successfully answer case studies.**

# Packaging

Professionalism shows both outside and in. How we look on the outside is the first thing people see, and then our personality has a chance to catch up.

Already we have touched on actions that we find appropriate at work and those that offend us. We are not much different than any other group of people. We have expectations of others and expect them to be met.

Famous people often spend thousands--even millions--on people to manage their image professionally and sometimes even personally. Assistants select just the right gifts, the right stationery, and make the right apologies when the occasional faux pas occurs. This course is about learning to manage the perceptions about you. After all, you are too good inside to let distracting behaviors take away from your effectiveness.

Notes:

**Learning Objective**

**Explain how appearance can affect your professional reputation.**

### Critical Thinking Exercise

In a moment you will be shown several photos. While viewing those photos, think about which people you would most like to meet. Who would you least like to meet? Who makes you the most comfortable? The least comfortable? Why?

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

# Appropriate Office Dress

## Critical Thinking Exercise

Working in groups, consider the job you do and the photos of the people below. You are judge, jury, and professional fashion critic. Are the featured people dressed appropriately for the job? How would you change their appearance? What kind of work do you think each person does?

Picture One

Picture Two

Picture Three

Picture Four

Notes:

### Too Casual

In a 1998 study, Dr. Jeffrey L. Magee found in a survey of Fortune 500 companies that business casual dress contributed to the following disturbing behaviors.

- Decrease in ethical behavior.
- Decrease in polite, mannerly behavior.
- Increase in gutter language and conversation.
- Decrease in morality.
- Increase in provocative actions.
- Decrease in productivity and overall quality of work.
- Decrease in commitment and company loyalty.
- Increase in complaints to HR.
- Increase in litigation.
- Increase in tardiness.

# Appropriate Office Dress (continued)

Picture Five

Picture Six

Picture Seven

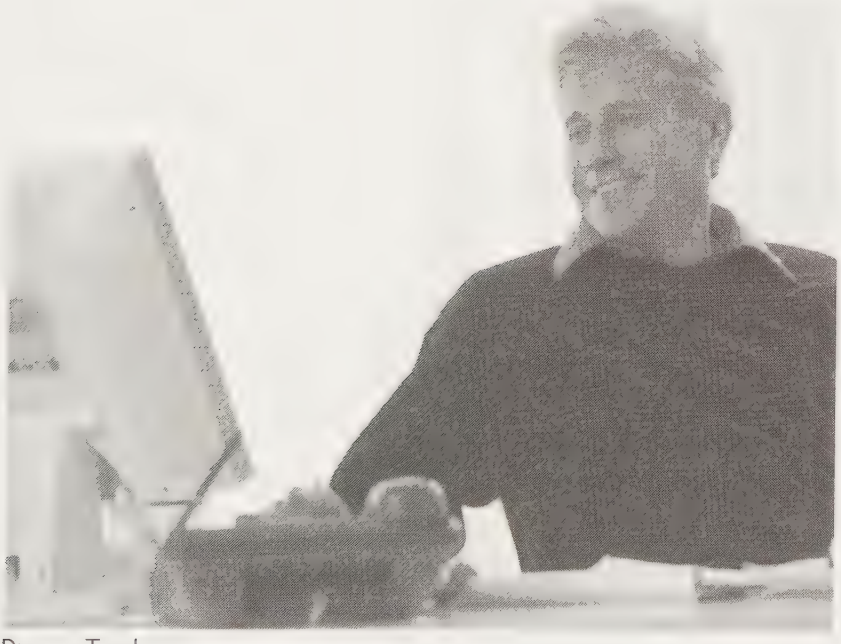
Picture Eight

# Appropriate Office Dress (continued)

Picture Nine

Picture Ten

Picture Eleven



Picture Twelve

# Dressing the Part

*A well-tied tie is the first serious step in life.*
Oscar Wilde,
*The Importance of Being Earnest*

Notes:

**Learning Objective**

**Discuss guidelines for dressing well for your job.**

Dressing for business has never been more flexible. Unfortunately, that flexibility allows greater room for poor choices.

## Three Simple Rules

1. Wear clothes that complement rather than contradict the impression you are trying to make.
2. Consider every aspect of your appearance from hair to shoes.
3. Blend with those around you.

## Practical Guidelines

- Buy the best you can afford. One nice outfit is better than three bad ones.
- Splurge on quality shoes, belts, and bags. Cheap or artificial leather can be spotted from a mile away.
- Do not chew gum in public—ever. If you need to freshen your breath, brush your teeth or use mints.
- If you must choose between dressing slightly up or down, choose the former.
- Get a good tailor. Use him/her.
- Don't wear clothing that is too short, too loose, or too tight.
- Have your shoes polished and their heels replaced if needed. Bad shoes destroy otherwise acceptable outfits.

# Dressing the Part (continued)

- Match your customer's level of formality +1.
- Wear a belt if your pants have belt loops.
- Do not wear clothes that are stained or require cleaning.
- Do keep your nails well manicured.
- In conservative environments, keep any tattoos covered by clothing at all times.

# Help for Men

- Do not wear jewelry other than a watch and a wedding and/or class ring.
- Even if you work in a casual office, own at least one really well tailored suit in navy or charcoal made of lightweight wool.
- Own several button-down collar or pointed collar shirts made of 100% cotton. Unless you are a master with an iron, send them to the cleaner for laundering.
- Consider purchasing a few cotton/poly blend shirts. They look almost as good as 100% cotton and are much easier to iron if you find yourself out of clean cotton shirts.
- Wear ties made of 100% silk – no polyester – not even a little bit.
- Own at least one pair of black leather tie shoes.
- Wear thin black socks with your black shoes.
- Own a navy blue blazer. Wear it.
- Own several pairs of khaki cotton chinos.
- If you need to, buy a nose/ear hair trimmer. Use it.
- Be aware of trends and fads. Remember that times change. If you were wearing it 10 years ago, you may not want to be wearing it now.

### Bad Choices

- Logo t-shirts (e.g. rock concert shirts)
- Jean cutoffs
- Acid-washed anything
- Anything neon
- Fake leather
- Mesh baseball hats
- Hats worn backwards
- Hats worn inside
- Pants that don't fit (e.g. too long, baggy, tight, etc.)

Notes:

Still not convinced? According to a recent survey conducted by MRI (Management Recruiters International), more than one third (34.2%) of executives polled think that business casual dress has gone too casual, eroding respect.

# Help for Men (continued)

- Pants worn with the waist band somewhere other than the waist
- Sweatpants if you are not exercising
- Tennis shoes if you are not exercising
- Bad mustaches
- Socks with sandals
- Noticeably dyed hair (e.g. hair dyed before a haircut)
- Work boots unless you are working in them
- Camouflage anything, unless it is your work uniform, you are hunting, or in a combat zone
- Needing a shower and/or hiding that need with cologne

Notes:

# Help for Ladies

- In conservative environments, avoid white shoes unless you are a nurse, bride, or on your way to the gym.
- In conservative environments do not wear open-toe shoes, ultra trendy shoes, or sleeveless clothing.
- Less is more when it comes to hairstyle, jewelry, makeup, and fragrance.
- If you need it, have your eyebrows professionally shaped.
- Get a good quality purse.
- Suits give a more professional appearance than dresses.
- Clothing should be tight enough to show that you are a woman but loose enough to show that you are a lady.
- Skirts and dresses should not be any shorter than just above the knee.
- Just because it's in a magazine doesn't mean that you have to wear it.

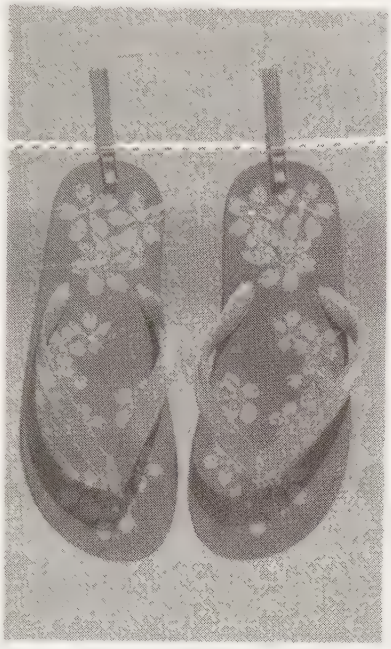
### Bad Choices

- Flip flops
- Tank tops
- Tube tops
- Logo t-shirts (e.g. rock concert shirts)
- Short shorts
- Hot pants
- Bare midriffs
- Spike heels
- Dressing "like a boy"
- Fishnet or decorative stockings
- Poorly applied makeup

**Good Looks Can Mean a Pretty Penny on the Job:** The Hammermesh-Biddle project revealed that attractive people have higher incomes. This was true even for construction work, telemarketing, and other jobs with low visual contact with the public.

# Help for Ladies (continued)

- Stretch pants
- Athletic wear if you are not exercising – this includes tennis shoes and sweat suits
- Underwear as outerwear
- See men's no-no's on the previous page for additional tips



# Time Management Skills Assessment

## Critical Thinking Exercise

Review the statements below and respond with the answer that is most like you. Use the following response codes: 0 = Always 1 = Sometimes 2 = Never.

1. I tackle difficult or unpleasant tasks without procrastinating _____
2. I spend enough time planning _____
3. I spend enough time on work-related activities _____
4. I am able to meet deadlines without rushing at the last minute _____
5. I always get assignments done on time _____
6. I accomplish what needs to be done during the day _____
7. I screen and group my telephone calls to allow for control over telephone interruptions _____
8. I have a weekly schedule on which I record fixed commitments such as work hours _____
9. I have a clear idea of what I want to accomplish during the coming quarter _____
10. I force myself to make time for planning _____
11. I feel I use my time effectively _____
12. I do things in order of priority _____
13. I avoid spending too much time on trivial matters _____
14. I am satisfied with the way I use my time _____
15. I prioritize my list in order of importance, not urgency _____
16. I prevent interruptions from distracting me from high priority tasks _____
17. I prepare a daily or weekly "to do" list _____
18. I plan time to relax and be with friends in my weekly schedule _____

Notes:

**Learning Objective**

**Identify your time management strengths and weaknesses.**

*A wise person does at once, what a fool does at last. Both do the same thing; only at different times.*

Baltasar Gracian

*Many people seem to think that success in one area can compensate for failure in other areas. But can it really?... True effectiveness requires balance.*

Stephen Covey

*Never let yesterday use up today.*

Richard H. Nelson

# Time Management Skills Assessment (continued)

19. I periodically reassess my activities in relation to my goals _____
20. I make constructive use of my commuting time _____
21. I keep up to date on my reading and research assignments _____
22. I judge myself by accomplishments of tasks rather than by amount of activity _____
23. I have discontinued any wasteful or unprofitable activities or routines _____
24. I try to do the most important tasks during my most energetic periods of the day _____
25. My actions are determined primarily by me, not by circumstances or by other people's priorities _____

**Results**

Total your results from the previous page. Then find the corresponding results below.

0 to 5 points: Congratulations! You have outstanding time management skills.

6 to 12: Well done. You have good time management skills.

13 to 20: You are managing your time well most of the time, but sometimes feel overwhelmed.

21 to 24: Your work career is likely to be stressful and less than satisfying unless you take steps to begin to manage your time more effectively.

More than 25: You need to work on your time management skills. This may be why you are having some difficulty staying organized.

# It's as Easy as 1, 2, 3

Write it down. Whatever it is, write it down so you don't have to think about it anymore and can free your brain for more important tasks. Next, remember to check your list regularly. Stuff happens and things change. So should your list. Don't overcrowd the list with trivia or "pie in the sky" tasks. Keep separate lists for those.

### Listing Tools

- Calendars
- Palm Pilots or Other Personal Organizers
- To-Do Lists
- Tickler Files

Regardless of which tool you use, it is a good idea to make a to-do list when it suits you – at the beginning of the day, at the end of the day, during "downtime," when you are overwhelmed, etc.

### Understanding the 80/20 Rule (Pareto Principle)

One key reason why prioritizing works is the 80/20 rule. The 80/20 rule states that 80 percent of our activities contribute less than 20 percent to the value of our work.

So, if you start with the important 20 percent of your tasks you still get most value out of your day even if you don't get everything done. By focusing most of your efforts on top-value activities, you will achieve much more than before.

Notes:

**Learning Objective**

**Review various time management rules and tools.**

**Benefits of Lists**

1. You remember to carry out all important tasks.
2. You tackle the most critical jobs first, and do not waste time on unimportant tasks.
3. You don't get stressed out by a large number of trivial jobs.

# It's as Easy as 1, 2, 3 (continued)

## Background

The 80:20 rule originated from Vilfredo Pareto, an Italian economist who studied the distribution of wealth in a variety of countries around 1900. He discovered a common phenomenon: about 80% of the wealth in most countries was controlled by a consistent minority--about 20% of the people. Pareto called this a "predictable imbalance." His observation eventually became known as either the "80:20 rule" or "Pareto's Principle".

## The ABC Method

The ABC Method is the simplest way to rank tasks. The letters "A," "B," or "C" are assigned to the various activities on a to-do list.

- "A" tasks are the ones that must be done—quickly. If these tasks are left undone for very long, negative consequences will result.
- "B" tasks are less important than "A" tasks. They should be done soon, but they can be postponed for a little while.
- "C" tasks can be put off indefinitely without dire consequences. Some "C" tasks may rise in priority to "B" or "A" tasks as time goes by, and their deadlines approach.

Don't just schedule tasks. Rather, visualize your day or week imagining how things will be accomplished. You may get some insight about how the schedule should be rearranged to be more efficient.

Try to do your planning at the same time every day. Use this time to review past accomplishments as well as future things to do.

Do it now. People will often say, "Call me tomorrow, and we'll book an appointment then." Respond by saying, "Let's save ourselves a call and do it now."

# It's as Easy as 1, 2, 3 (continued)

### Example

| Task | Rank | Order |
|---|---|---|
| Make plane reservations for September trip. | C | 6* |
| Finish report due Friday. | A | 3 |
| Make hair appointment. | B | 5* |
| Return phone calls from yesterday. | B | 4 |
| Read emails. | A | 1 |
| Order new office supplies. | C | 7* |
| Send out meeting reminders for this afternoon's meeting. | A | 2 |

* Items that could be delegated if appropriate.

### Questions to Ask Yourself While Prioritizing

1. Is this task going to help me achieve an important goal?
2. Is there a deadline?
3. Is this something my boss needs to have done?
4. Is this something that will make other work easier later?
5. Is the task important to me?
6. Is it important to someone I care about?
7. Will it matter in a year?
8. What will happen if I don't do it?

**TIME MANAGEMENT TIP**

Every day, select the six most important things you need to get done and then do them. If you work like this, you will never wonder where your day went.

**PRODUCTIVE DAYS**

Which days are employees' most productive according to corporate executives?

Tuesday – 51%
Monday – 17%
Wednesday – 15%
Don't Know – 11%
Thursday – 5%
Friday – 1%

(Source: Accountemps survey of 150 U.S. executives)

# It's as Easy as 1, 2, 3 (continued)

## Critical Thinking Exercise

Using the chart below, list tasks from an upcoming day. Next, rank and order them using the ABC method.

| Task | Rank | Order |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

## Scheduling

The final step in the time management planning process is scheduling. Scheduling is the act of assigning specific times to accomplish the priorities on your list. Consider the following rules to improve your scheduling success.

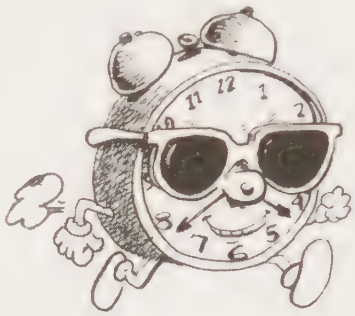
- Group similar tasks together
- Use the 20% rule
- Pick low-hanging fruit
- Use "up time" scheduling
- Make the most of your first and last 15 minutes of the day

If you find that you always run late, something is wrong. Are you not allowing for enough time because you secretly enjoy the thrill of trying to drive 60 miles in 30 minutes?

# Dealing with Deadlines

Sometimes we fail at time management because we have "too much to do," we panic, and get nothing done. Deadlines can be better managed with a few simple rules.

1. Review where you are each day.
2. Be realistic.
3. Remember to use the 20% rule.
4. Delegate where possible.
5. Take it to the boss if needed.



### Critical Thinking Exercise

In groups, review the following cases and determine possible solutions for each.

### Case One

You support two bosses. Both have assigned you mountains of work. You will not get it all done in the time allotted. On top of that, you have let your work area get overcrowded with paper. What should you do?

Notes:

**Learning Objective**

**Explain how to successfully manage deadlines.**

**Simple Tools that Work**

- An "I Love Me" File
- Self Contracts
- Beginning Earlier
- A Ten-Minute Breather
- A Good Night's Sleep
- Breakfast

# Dealing with Deadlines (continued)

### Case Two

You have overscheduled your life. You volunteered for a work project, but your kids' activities keep you busy all weekend. You are running errands in your free time just to keep up. Part of you would like to get in your car, drive, and not look back. What should you do?

### Case Three

Your desk is a disaster; your files are out of order; you have ordered multiple books that you don't have time to read. More catalogs have come in the mail. You have missed two meetings in error recently, and people have asked you if you are okay. What should you do?

# Controlling Seven Major Interruptions

Interruptions create stress and disrupt what might otherwise be a perfectly good workday. Although we can't control all of them, we can do our best to minimize their impact.

Notes:

**Learning Objective**

**Identify techniques for controlling interruptions.**

### Critical Thinking Exercise

Working in groups, use the space below to suggest possible solutions for dealing with the problems listed above.

1. Ourselves

2. The Telephone

3. Internal Visitors

4. External Visitors

5. Meetings

6. Your Direct Reports

7. Your Boss

# Surefire Responses to Workload Interruptions

Notes:

**Learning Objective**

**Review responses to people who make demands of your time.**

## Critical Thinking Exercise

Evaluate the statements below. Which could you use on a colleague? A boss?

1. Here is what I have on my plate right now. Would you like me to rearrange things so I can handle this new task first?

2. I will be happy to take care of that. Is there something you can take off my plate so this will not disrupt other deadlines?

3. May I delegate parts of this job?

4. What is the drop-dead date?

5. I have project x and project y that I need to complete before I can begin working on this.

6. Am I the best person to complete this task?

7. When I have finished this, I would like to talk with you about ways we could avoid having this happen again at the last minute.

# Surefire Responses to Workload Interuptions (continued)

8. Other projects will need to be put on hold in order for me to do what you asked. Will you speak to those who are depending on me?

9. So that I understand the big picture, could you tell me how this ties in to the other projects I am working on?

- What tone of voice will you need to use when making the above statements?
- Are there any other responses you can think of to limit, manage, or reduce workload interruptions?

# Procrastination Pests

At some point in our lives, all of us have fallen victim to the procrastination bug. We know that a task must be completed, yet we put it off until the last possible moment.

**Why do we procrastinate?**

- We don't know where to start.
- We don't want to accomplish the task because it's too hard, boring, painful, etc.
- We don't like the person who assigned it.
- We love the adrenalin rush caused by the eleventh hour delay.

**What can be done to zap the procrastination bug once and for all?**

Notes:

**Learning Objective**

**Discuss techniques for conquering procrastination.**

# Ten Ways to Make the Boss Happy

## How You Can Help Yourself

1. Be Good at What You Do
2. Be a Successful Leader
3. Save the Organization Money and Time
4. Learn What is Really Important to Your Boss
5. Get Performance Feedback
6. Solve Problems Before the Boss Has to Do It for You
7. Give the Boss the Bad News and the Good News
   - Avoid surprises
8. Volunteer for Difficult Assignments
9. Don't Ask for Unneeded Guidance
10. Don't Complain

Notes:

**Learning Objective**

**Review ten actions you can take to help your boss (and help yourself).**

# My Goals from This Session

Based on what we have discussed today, your final assignment is to consider the skill you wish to improve. Use the questions below to guide your thinking.

1. What skill do you propose to improve?

   How to give feedback
   Learning to say "NO"
   Please pass the butter.

2. Why is this improvement needed?

3. What is your recommendation for improvement?

4. What steps do you need to take to implement this change?

5. How will you know if you are successful?

Notes:

*Crystallize your goals. Make a plan for achieving them and set yourself a deadline. Then, with supreme confidence, determination and disregard for obstacles and other people's criticism, carry out your plan.*
Paul J. Meyer

*Don't just think it, ink it!*
Mark Victor Hansen

*Know your goal, make a plan and pull the trigger.*
Phil C. McGraw

# Telephone Phrases Ready Reference

### Answering the Telephone

- Good Morning/Afternoon/Evening (Your Organization's Name). This is (Your Name). How may I help you?
- Thank you for calling (Your Organization's Name). This is (Your Name). How may I help you?
    - Remember to sound upbeat, positive, and calm.

### To Place Someone on Hold

- May I put you on hold for a moment while I look that up/handle that issue/etc.?
- If you could hold for a moment, I would be happy to look that up/handle that issue/etc.
- May I please put you on hold for a moment?
- Would you like to hold for a moment, or would you like for me to call you back?
    - Remember to wait for the caller's answer.
    - If it takes you more than one minute, pick the telephone back up and let the caller know you are still working on finding a resolution.

### To Transfer

- Let me put you in touch with (Person's Name/Department's Name). He/she/they can handle that for you.
- (Person's Name/Department's Name) is the subject matter expert. I can connect you with him/her/them.
- (Person's Name/Department's Name) can help you with that. One moment, and I can put you through.
    - If appropriate, give the extension to the caller.
    - If possible, stay on the line and introduce the caller to the person/department who can help.

### To End a Call

- Is there anything else I can help you with today?
- Thank you for calling.
    - If appropriate, recap any actions you will take after the call.

# Telephone Phrases Ready Reference (continued)

### When a Customer or Client Thanks You

- > It's my pleasure.
- > I'm glad to be able to help.
- > You are welcome. Is there anything else I can help you with today?

### When a Customer or Client Is Frustrated

- > Let me see if I can help you work through this issue.
- > Let's take it from the beginning and see if we can work through this together.
- > I can hear that you are upset, and I do want to help you.
- > I'm listening to you.
    - o If appropriate, repeat what the caller has said. Reframe any negative statements into solution-oriented ones.
    - o Stay calm. If the customer needs to vent, don't jump to the solution too quickly. The caller may not be ready to listen to you yet.

**General Guidelines for Better Telephone Relations.**

- Always remain positive about your own organization, its processes, and its people.
- Replace the words "but" and "however" with "and" whenever possible. Your message will sound more positive and professional.
- Avoid having food or gum in your mouth when talking on the telephone.
- Remember to go slowly and to carefully articulate your words.

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